

Great Lakes Region President & President-Elect Preparation

President Office Duties
and Responsibilities



July 1, XXXX-1

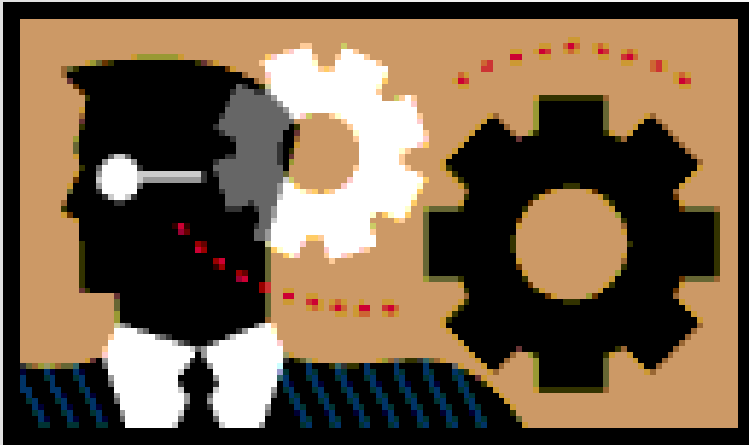


**Your job actually starts
with your election to
President-Elect**

**Spend the year getting to
know expectations**



Mirrors



- Regular conversations with the Current President

- sharing of e communications
 - Institute
 - Chapters
 - Region Conference info

- Discussion on CSI Issues

President-Elect

- Take an interest in planning the Region Meeting for your year of service.
- It will be your biggest public event of the year.



Region Conference Timeline Items

Is the schedule filled?

There are chapter events/region events.

Is the Awards committee active in their communication?

Is there a published due date for award submissions?

Does the Host Chapter have an active website for registration, promotion?

Are the Region Conference activities being buttoned down?

Annual Meeting/Awards/Leadership Training?

Institute Personnel invited and confirmed?

Leadership Transitional Outreach

June prior to taking office
Region President debrief



Take office in July

- Be Prepared
- Fill/Confirm all positions for committees/offices
- Budget-approval and oversight
- Program reviews
- Welcome and direction to officers/committees
- Build the excitement and the energy for moving forward

Institute Resources

<https://www.csiresources.org/chapterregionleaders/home>



search

Chapter Management

DCP

Membership

Marketing

Chapter & Region Leader Resources

Use this site to find dashboards, how-to's, and the Chapter & Region Leader discussion board.

[VIEW DISCUSSION BOARD](#)



Institute Resources

<https://www.csiresources.org/chapterregionleaders/home>

Access Chapter and Region roster information.

ROSTER DASHBOARD

Use these update tools to share your chapter's governance information.

UPDATE TOOLS

Track key deadlines with the Chapter Planning Checklist.

PLANNING CHECKLIST

Key Stone Events

- Region Conference
- CONSTRUCT (2021 Conference in Nashville)
- Monthly Conference calls
- Leadership Training
- Chapter Visits
- Region Voice
 - CSI Leader Newsletter
 - Leader Forums
 - Twitter, Linked-In, Facebook
 - CSI Webinars (Pyramid Diet)

Maintain/Update

- By-Laws
- Operating Guide
- Strategic Plans
- Surveys
- Officer Data Bases
- Region Communication



Chapter Visits

- Trade Shows
- Present Region/CONSTRUCT Awards
- Institute updates and information
- Chapter Tours
- Keystone events
 - Look for future leaders!
 - Educate about CSI happenings
 - Address questions/concerns



Communication

- Monthly Meetings/conference calls
- Monthly newsletter
- Chapter visits
 - Address issues as they happen
 - Answer the calls
 - Answer the media (social, internal)
 - Institute, Chapter, Member.
 - BE PRESENT!

Region Conference Leadership Classes

- Region Conference Main purpose/Action items
 - Leadership classes for new officers
 - Invite Institute staff
 - Coordinate with host chapter events
 - Annual Board Meeting
 - Annual EXCOMM Meeting
 - Annual Board Meeting
 - Region Awards

Co-Ordinate Region Conference Schedule for 3 years

Spreadsheet to next Region
President.

Contact next Region Chair.

Contact next President Quadrant



CONSTRUCT

- Activities Prior to the Event
 - Promote attendance
 - Plan the Region Caucus
 - Education for members/ National Voting Issues
 - Work at the CSI Booth
 - Network with other CSI Leaders

2021-National Convention in Nashville. No CONSTRUCT this year.



Rewards

- We have a GREAT Region with fantastic people.
- It's an honor to get to know more of them.
- Honor to serve.
- Rewarding to learn how others solve problems



THANK YOU

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***Building Knowledge
Improving Project Delivery***